



Insightly CRM Pricing Plans Comparison Chart

Insightly CRM Pricing Plans

	BEST VALUE		
Plus	Professional	Enterprise	
<h1>\$29</h1> <p>USD per user/month <i>(billed annually)</i></p> <p>\$35/user/month <i>(billed monthly)</i></p> <hr/> <p>Keep in touch and never drop the ball. Get all the right tools to optimize your message.</p> <ul style="list-style-type: none">• Scheduled emails• 100 custom email templates• Higher record limits• MailChimp auto-import <p>Now you're talking!</p> <hr/>	<h1>\$49</h1> <p>USD per user/month <i>(billed annually)</i></p> <p>\$59/user/month <i>(billed monthly)</i></p> <hr/> <p>Leap forward in productivity and security. Protect your data and automate processes.</p> <ul style="list-style-type: none">• Role-based permissions• Workflow automation• Lead assignment roles• Priority email support <p>Productivity at the professional level.</p> <hr/>	<h1>\$99</h1> <p>USD per user/month <i>(billed annually)</i></p> <p>\$129/user/month <i>(billed monthly)</i></p> <hr/> <p>Contact us and ask how Insightly can give you the best deal for the features and limits you need.</p> <ul style="list-style-type: none">• Unlimited records• Unlimited storage• Dedicated specialist <p>We can help you grow your business to new heights.</p> <hr/>	

To speak with a human being, call: **1-888-999-4039**

	Plus	Professional	Enterprise
Find and manage leads			
Lead management Manage and track leads and qualify prospects	●	●	●
Lead assignment and routing Automatically route incoming leads to the right reps based on your criteria	—	●	●
Automatic duplicate detection Improve data quality by ensuring leads are not duplicated	●	●	●
Mass emailing Send custom, templated, and tracked emails to targeted lists of leads or customers	●	●	●
Email templates Improve productivity with templated emails and track open and reply rates	●	●	●
Schedule outbound emails Send emails to prospects and customers at exactly the right time, automatically	—	●	●
Visualize leads with kanban Drag and drop leads to move deals along visually in kanban view	●	●	●
Web to lead capture Capture new leads on any web page and filter out spam automatically so you never lose a hot prospect	●	●	●
Automatic social profile enrichment Social network profiles are automatically appended to records so you have the full picture of every contact and lead	●	●	●
Build stronger customer relationships			
Contact and organization management View a complete picture of every contact and organization including history, communications, activities, and linked items	●	●	●
Task and event management Sync calendar events and track assigned tasks so nothing falls through the cracks	●	●	●
Relationship linking Map and better understand complex customer relationships through flexible record linking	●	●	●
Attach files from cloud storage Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account	●	●	●

	Plus	Professional	Enterprise
<p>Sell more productively</p> <p>Opportunity management Manage and track all the details of every deal with stages, pipelines, and custom fields</p> <p>Customizable sales processes Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account</p> <p>Apply task and event activity sets Assign a templated sequence of tasks and events to leads, opportunities, projects, or organizations</p> <p>Assign sales teams View which sales team members worked on every deal</p> <p>Batch update records with ease Filter, select, and update the details of any number of records in Insightly from any list view</p>	●	●	●
<p>Click-to-call</p> <p>Integrated phone dialer and call logging Place and receive phone calls with click to call, and log and record every call automatically</p> <p>Automatic call analysis and reporting Track phone call frequency and length, and filter and report on call logs</p>	—	\$	\$
<p>Work from any device</p> <p>Native Android and iOS mobile apps Utilize the power of Insightly from anywhere with our award-winning mobile applications</p> <p>Real-time mobile data synchronization The Insightly mobile apps are always up to date and in sync</p> <p>Mobile business card scanning Take photos of business cards from your phone and automatically convert them to contacts or leads</p> <p>Mobile contact and calendar integration Automatically sync with the contacts and calendar apps on your phone</p> <p>Mobile voice notes Record audio notes into Insightly from the microphone on your phone</p>	● 15 ●	● 25 ●	● 50 ●
<p>Deliver projects</p> <p>Integrated project management Track projects, milestones, and all correspondence and project activities in Insightly</p>	●	●	●

	Plus	Professional	Enterprise
<p>Deliver projects <i>continued</i></p> <p>Milestones and associated task tracking Track milestones and schedule and assign associated tasks</p> <p>Calendar synchronization Sync tasks and events to your work calendar</p> <p>Configurable project processes Build templates of tasks and event sets, and apply them to projects in one click</p> <p>Convert won opportunities to projects Move all the way from leads into opportunities and then to projects in Insightly, and preserve all data at every step</p>	●	●	●
<p>Business intelligence platform</p> <p>Built-in business intelligence dashboards Build beautiful dashboards with over 40 different chart types and drag-and-drop configurable layouts</p> <p>Customizable real-time insight cards Create sophisticated charts and graphs, and share them with co-workers on any dashboard</p> <p>Build and share customized BI dashboards Share complete dashboards or individual charts and graphs with co-workers</p> <p>Configurable reports Flexible reports with groupings, totals, summaries, and drag-and-drop field selection</p> <p>Customized report scheduling and emailing Schedule reports to run at any time and have the results emailed to the right people, automatically</p>	●	●	●
	—	100	UNLIMITED
<p>Collaborate across the company</p> <p>Integration with Google G-Suite Login, Calendar, and Docs The most popular CRM to integrate with the full suite of Google G-Suite productivity tools</p> <p>Integration with Microsoft Office 365 Login, Calendar, and OneDrive Utilize Insightly from Outlook on your phone or computer, link to OneDrive files, and login to insightly with your Office credentials</p> <p>Slack integration with AI bot Add the Insightly Slack AI bot and get CRM data within Slack</p> <p>Insightly Outlook add-on Get the power of Insightly and all your customer and sales data right inside Outlook</p>	●	●	●

	Plus	Professional	Enterprise
<p>Collaborate across the company <i>continued</i></p> <p>Insightly Gmail add-on Send HTTP notifications to any endpoint when records are added or changed</p>	●	●	●
<p>Model and automate business processes</p> <p>Complete workflow automation Automate and orchestrate workflow tasks, sending emails, updating records, executing custom code, firing webhooks, and much more</p> <p>Custom object creation Store any type of data inside Insightly and relate it to contacts, organizations, sales, or projects with granular permissions</p> <p>Products, Price Books, and Quotes Select products, pricing, and deliver quotes from within Insightly CRM to accelerate sales processes, drive efficiency, and improve your customer's experience</p> <p>Custom validation rules Author validation checks to suit your business and its processes</p> <p>Calculated fields on any object Powerful formula engine can execute and store complex calculations in any object</p> <p>Roles and permissions Set granular roles and permissions for objects and data access for different users</p> <p>Configurable profiles and page layouts Control read/write permissions for fields in any object for different users</p> <p>Deploy custom apps on any platform Build sophisticated custom apps and deploy them across web and mobile in minutes</p> <p>Lambda function authoring and execution Create and execute custom code within Insightly in any one of five languages when records are created or updated</p> <p>Configurable webhooks Send HTTP notifications to any endpoint when records are added or changed</p> <p>Dynamic page layout rules Tailor business processes, field visibility, and required fields on the fly from user input</p>	<p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>2</p> <p>2</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p> <p>—</p>	<p>●</p> <p>●</p> <p>—</p> <p>—</p> <p>—</p> <p>UNLIMITED</p> <p>UNLIMITED</p> <p>—</p> <p>—</p> <p>●</p> <p>●</p> <p>—</p>	<p>●</p> <p>●</p> <p>●</p> <p>●</p> <p>●</p> <p>UNLIMITED</p> <p>UNLIMITED</p> <p>●</p> <p>●</p> <p>●</p>
<p>Connect to any application</p> <p>Over 250 integrations to business apps Insightly integrates with a large range of business applications right out of the box</p>	●	●	●

	Plus	Professional	Enterprise
Connect to any application <i>continued</i>			
Published web services API <small>Access our comprehensive REST API at no additional cost</small>	●	●	●
Configurable outbound webhooks <small>Send HTTP notifications to any endpoint when records are added or changed</small>	—	●	●
Schedule serverless lambda functions <small>Create and execute custom code within Insightly in any one of five languages when records are created or updated</small>	—	—	●
Calendar sync <small>Sync events with Google or Microsoft Office calendars</small>	●	●	●
Contact sync <small>Sync contact details with Google Contacts</small>	●	●	●
Gmail integration <small>Access Insightly information and save records from within Gmail</small>	●	●	●
Outlook integration <small>Access Insightly information and save records right from within Outlook</small>	●	●	●
Cloud file storage integration <small>Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account</small>	●	●	●
Get the most out of Insightly			
Standard support plan <small>Access email-based support, Insightly's comprehensive Help Center, and Community Forums</small>	●	●	●
Customized Support & Service Plans <small>Not sure what help you'll need? Call us and we'll configure a Support & Service Plan just for you.</small>	—	\$	\$
Professional services <small>Not sure how CRM can help you reach your business goals? We have professional experts to help you. Call us for a tailored proposal: 1-888-999-4039</small>	—	\$	\$
Developer API support <small>Connect Insightly to any app or system with the help of our Developer support plans</small>	—	\$	\$
Core CRM			
Record limit	100,000	250,000	UNLIMITED
File storage	10GB	100GB	UNLIMITED
Records per import	25,000	50,000	50,000
Mass email (emails per day)	2,500	5,000	10,000